

POSITION DESCRIPTION**Rvsd 10/31/19**

DOA-15302 (C07/2015) PREVIOUSLY OSER-DMRS-10 State of Wisconsin Department of Administration/Division of Personnel Management	1. Position No. 029470	2. <u>Cert</u> / Reclass Request No. 20-8386 Effective:	3. Agency No. 566
4. NAME OF EMPLOYEE	5. DEPARTMENT, UNIT, WORK ADDRESS Wisconsin Department of Revenue Division of Technology Services Customer Services Bureau Customer Support Center Section 2135 Rimrock Road Madison, WI 53714		
6. CLASSIFICATION TITLE OF POSITION Management Information Chief			
7. CLASS TITLE OPTION (to be filled out by Human Resources Office)	8. NAME AND CLASS OF FORMER INCUMBENT Tim Samuelson, Management Information Chief		
9. AGENCY WORKING TITLE OF POSITION Customer Support Center Section Chief	10. NAME AND CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES Keith Gross, Management Information Chief		
11. NAME AND CLASS OF FIRST-LINE SUPERVISOR Sally Jackson Revenue Administrative Manager	12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?		
13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> IF YES, COMPLETE AND ATTACH A SUPERVISORY POSITION ANALYSIS FORM.			

14. POSITION SUMMARY – PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:

SEE ATTACHED

15. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION

- GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
- WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
- TIME %: Include for goals and major worker activities.

TIME %

GOALS AND WORKER ACTIVITIES

(Continue on attached sheets)

SEE ATTACHED

16. SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION

- a. The supervision, direction, and review given to the work of this position is [] close [] limited [X] general.
- b. The statements and time estimates above and on attachments accurately describe the work assigned to the position.

Signature of first-line supervisor _____ Date _____

17. EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position.

Signature of employee _____ Date _____

18. Signature of Human Resources Manager _____ Date _____

POSITION SUMMARY (Line 14)

This position works under the general supervision of the Director of the Customer Services Bureau in the Division of Technology Services (DTS). The position serves as the manager responsible for overseeing the DTS Customer Support Center Section, which includes the Workstation Support Unit and the Service Desk Unit. The Service Desk Unit handles problem calls from internal Department of Revenue (DOR) staff. They are responsible for first level problem determination and resolution, and for escalating unresolved problems to the appropriate support areas for attention. The Workstation Support Unit is responsible for the selection, testing, implementation and support of desktop hardware, software, printers, mobile devices and voice services.

This position monitors and reviews Information Technology (IT) change, incident, and service requests to ensure staff meet service level agreements. It also evaluates technologies and recommends policies and procedures that govern the efficient use and support of desktop computer hardware and software. It assigns, manages and directs the work efforts of section staff, provides input on proposed projects and makes recommendations regarding hardware and software technologies that meet the business needs of the department.

This position participates in developing prototypes and strategies, and overseeing long range and short-range plans for customer support services and products. In addition, the position contributes to the overall DTS system support methodology and will serve as a project management leader and mentor to service desk and workstation support staff.

TIME % GOALS AND WORKER ACTIVITIES (Line 15)

- 55% A. Management of the Customer Support Center Section in support of the department's IT business initiatives across divisions and projects.
- A1. Deliver technology, incident and problem resolution, workstation support, and change management guidance to maximize customer satisfaction and minimize costs.
 - A2. Oversee software license management to maintain license compliance and reduce costs.
 - A3. Periodically review overall IT support for customers and proposed plans for workstation architecture.
 - A4. Administer work plans and schedules, make project assignments, monitor project progress and take corrective action as necessary to meet project deadlines.
 - A5. Direct IT projects, working with project sponsors and business partners to identify scope and appropriateness of the project(s) and ensure goals are met.
 - A6. Maintain knowledge of business partner technology needs in order to maintain a strategic IT plan which supports current and future needs.
 - A7. Develop and maintain project resource estimates and timelines for IT projects.
 - A8. Provide oversight to ensure all active projects are staffed and managed according to department standards.
 - A9. Develop, manage and report on operational metrics for staff and system performance.
 - A10. Create and support opportunities to innovate processes, reduce costs, or increase efficiencies.
- 30% B. Supervision of section staff to ensure efficiency and quality of work while adhering to departmental policies and procedures.
- B1. Establish workload priorities, assign tasks, and direct employees in completing their assigned duties.
 - B2. Ensure section staff is adhering to all departmental policies and procedures.
 - B3. Ensure section staff is adhering to divisional policies and procedures including project management methodologies and documentation requirements.
 - B4. Initiate disciplinary action according to department policies and procedures as necessary.
 - B5. Interpret departmental policies and procedures, civil service statutes and administrative rules to ensure employee compliance.
 - B6. Develop and maintain a current skills inventory and knowledge transfer plan for assigned staff.
 - B7. Develop performance standards to maximize productivity of assigned staff.
 - B8. Recommend training and career development for assigned staff.
 - B9. Assist in development of performance improvement training programs for staff as necessary.
 - B10. Recommend/initiate personnel actions (hiring, reclassification, reallocation, competitive promotional examination, discipline, performance improvements plans, terminations, etc.) as

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needed to ensure appropriate and effective allocation of staff resources and compensation of employees.

- B11. Maintain and provide first line channels of communication with all staff to ensure that employees are informed of Agency and Division objectives.
- B12. Communicate project objectives and plans and encourage input from all employees regarding division or project policies and procedures.
- B13. Investigate and resolve employee complaints, referring to senior management and/or Human Resource Services staff as appropriate.
- B14. Ensure that all assigned employees adhere to security and confidentiality standards.
- B15. Support the Department's Affirmative Action Policy.
- B16. Complete employee performance evaluations by required deadlines.
- B17. Review and approve employee work schedules, reported work time and leave requests as required by the Department's policies and procedures.
- B18. Keep up-to-date on effective management techniques and team building strategies.

15% C. Maintain technical knowledge, professional working relationships, and participate in professional development.

- C1. Maintain current knowledge of technologies related to tax administration software.
- C2. Interact with other staff, managers, and business stakeholders in a professional manner to maintain a positive working environment.
- C3. Keep current with changing IT hardware and software through reading trade publications, attending training, conventions and seminars.
- C4. Participate in professional development and technical training programs to maintain a high level of knowledge related to departmental IT needs.
- C5. Perform additional tasks/duties as assigned.

KNOWLEDGES, SKILLS AND ABILITIES

1. Knowledge and ability to perform leadership skills (e.g., leading change, strategic planning). Inspires and motivates others to perform well; effectively influences actions and opinions of others. Works well with all implementation team members and management team of DOR.
2. Planning and organization/Project Management Skills. Able to coordinate many different project tasks for complex hardware/software implementation projects (determines relative importance of each; prioritizes and plans work activities; sets appropriate deadlines to complete activities accordingly); effectively manages time and resources; sets goals and objectives. Knowledge and skill in usage of various IT project management methodologies, tools and techniques.
3. Knowledge of management authority, supervisory skills, employee performance, merit/compensation.
4. Ability to manage staff and their respective work assignments.
5. Ability to develop and maintain effective working relationships with staff in other divisions/ departments, vendors and a wide variety of customers.
6. Knowledge of IT architecture, automated business systems and infrastructure at DOR.
7. Knowledge of department strategies such as leveraging IT and process improvement.
8. Knowledge of business process improvement/re-engineering techniques.
9. Knowledge of research techniques and resources.
10. Effective collection and use of data.
11. Knowledge and skill related to training (identifying needs, developing and presenting).
12. Effective oral and written communication skills.
13. Knowledge and skill in implementing, managing and completing technical plans and projects at multiple levels.
14. Knowledge and skill in installation plans and schedules.
15. Knowledge of customer service principles, methodologies, techniques, and systems.
16. Knowledge and ability to analyze and resolve complex customer technical problems and issues.
17. Knowledge of change, problem and incident management methodology and practices.
18. Knowledge of workstation hardware and software.
19. Knowledge of software licensing management.
20. Knowledge of office software.
21. Knowledge of state procurement and contracting practices.

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
DIVISION OF PERSONNEL MANAGEMENT
DOA-15316 (C07/2015)
S. 230.09 WIS. STATS.
PREVIOUSLY OSER-DCR-84



Wisconsin Human Resources Handbook Ch. 324
COMPENSATION & LABOR RELATIONS
101 E. WILSON ST., 4TH FL
MADISON, WI 53703

Supervisor Exclusion Analysis

This information is to be provided by the position's supervisor and reviewed by the agency central office human resources representative for both filled and vacant positions and must be submitted as part of any position description (PD) for a position performing supervisory responsibilities (i.e., if # 13 of the PD is checked YES). This information will be used to determine (1) if the position is performing supervisory functions and thus should be allocated to a supervisory classification and (2) what supervisory classification is appropriate based on the total duties of the position.

According to s. 111.81(19), Wis. Stats., a supervisor is any individual "who has authority, in the interest of the employer, to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline employees, or to adjust their grievances, or to authoritatively recommend such actions" and "whose principal work is different from that of the subordinates." The criteria used by the Wisconsin Employment Relations Commission (WERC) to apply this definition include: the authority to effectively recommend the hiring, promotion, transfer, discipline or discharge of employees; the authority to direct and assign the workforce; the number of employees supervised (typically a minimum of 3 FTE permanent employees); the amount of time spent supervising; the number of other persons exercising greater, similar or lesser degrees of authority over the same employees; the level of pay, including an evaluation of whether the supervisor is paid for skill or supervision of employees; whether the supervisor is primarily supervising an activity or is primarily supervising employees performing the activity; whether the supervisor is a working supervisor or whether he/she spends a substantial majority of his/her time supervising employees; and the amount of independent judgment and discretion exercised in the supervision of employees. The WERC ultimately determines the appropriateness of supervisory exclusions.

Position Identification Data

1. Name of Employee (if filled):
2. Civil Service Classification: **Management Information Chief**
3. Department and Division: **Revenue, Division of Technology Services**
4. Bureau, Section and Unit (or comparable): **Customer Service Bureau; Customer Support Center Section**
5. Name and Classification of Supervisor: **Sally Jackson, Revenue Administrative Manager - Director, Customer Service Bur**
6. Name and Complete Civil Service Title of Former Incumbent (if any): **Tim Samuelson, Management Information Chief**

7. Supervisory Responsibilities

- a. In view of the definition statement and criteria listed in the second paragraph of this form, does the incumbent of this position:
 - (1) have the responsibility for directly supervising the activities of other classified employees? YES ☒ NO ☐
 - (2) have the responsibility for supervising the activities of lower level supervisors? YES ☐ NO ☒
 - (3) meet the definition statement and criteria? YES ☒ NO ☐
- b. List the official classification titles and number of permanent classified employees (full or part-time) directly supervised by the incumbent. If this position supervises lower level supervisors, indicate the number of employees supervised by the lower level position(s) in parentheses after the classification title of the position. (NOTE: LTE, student, patient/inmate, volunteer, and unclassified employees should be specifically identified since the direction of these individuals is not considered to warrant supervisory status.)

13 – Total FTE

- 1 – IS Technical Services – Consultant/Administrator (07-32)
- 3 – IS Technical Services – Specialist (07-33)
- 9 – IS Technical Services – Senior (07-34)

Supervisor Exclusion Analysis (page 2)

c. What percentage of this position's total time is allocated to each of the following?

- | | |
|--|-----|
| 1) Supervisory functions (i.e. hiring, dismissing, disciplining employees, evaluating performance, settling grievances)? | 20% |
| 2) Activities relating to supervisory responsibilities (i.e., establishing operating procedures, reviewing work of subordinates, counseling subordinates on performance, training and orienting new employees, performing related administrative functions, etc.)? | 40% |
| 3) Performance of other work activities <u>similar</u> to those of the employees supervised? | 20% |
| 4) Performance of other non-supervisory work activities <u>different</u> from those of the employees supervised (including program administration)? | 20% |

*NOTE: The totals of c.1), 2), 3), and 4) must equal 100%. 100%

8. Organizational Relationships

List (in order of descending authority) the names and classification titles of all other positions in the employing unit in the chain of command over the employees listed in 7.b.

Peter Barca, Secretary of Revenue

Rick Offenbecher, Administrator, Division of Technology Services

Sally Jackson, Revenue Administrative Manager - Director, Application Services Bureau

A copy of the organizational chart must be attached for the immediate work unit (i.e., the organizational unit which includes the employees supervised), including the names and classifications of all employees.

9. Supervisory Activities

Is this position identified as a formal step in the employee grievance procedure? YES ☒ NO ☐ (If no, list below the name and classification of the first formal step in the grievance procedures for the employees listed in 7.b.)

A signature below means the position has been reviewed and you have concluded it meets the definition of supervisor found in s. 111.81 (19), Wis. Stats.

Supervisor _____ Date _____
Sally Jackson

Human Resources Representative _____ Date _____
Linda Weber

To be completed by Incumbent (for filled positions):

- ☐ I agree with the preceding statements.
- ☐ I do not feel that the preceding statements are accurate for the reasons indicated below.
- ☐ No Comment

Employee Signature _____ Date _____



Management Exclusion Analysis

This analysis should be completed by the position's supervisor and reviewed by the agency human resources representative prior to classifying a position as "management." The information will be used to assist in determining if the position is performing duties which support inclusion of the position in a career executive or other management classification, resulting in exclusion of the position from bargaining unit representation.

Wisconsin Statute s. 111.81(13), excludes management personnel from the definition of employee for collective bargaining purposes. Section 111.81(13) defines "management" to include "those personnel engaged predominately in executive and managerial functions, including such officials as division administrators, bureau directors, institution heads, and employees exercising similar functions and responsibilities as determined by the [Wisconsin Employment Relations] Commission."

The Commission referenced above is the Wisconsin Employment Relations Commission (WERC) which, under s. 111.825(3), assigns eligible employees to the appropriate bargaining units and ultimately determines the appropriateness of management exclusions.

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In Case 33, No. 16403, SE-65, Decision No. 11640-C, the WERC used the following criteria in determining if employees were management. (Some of the statements are interpretations of statements made by the WERC rather than statements actually made in the decision.)

7. If the employee is a division administrator, bureau director, or institution head, the employee is, per se, management.
8. If the employee is not a division administrator, bureau director, or institution head, and if the employee is engaged predominately in executive and managerial functions similar to those engaged in by division administrators, bureau directors, or institution heads, the employee is management.

"Predominate function" is defined as the primary duties performed by the employee. If the primary duty is to provide legal services or supervise and review the work of others for compliance with established policy, the employee is not engaged predominately in executive and management functions, even though some of the time is spent in formulation, determination, and implementation of management policy. Predominate functions may be based on importance or percent of time spent. Generally, percent of time spent will be the determining factor.

(OVER)

Management Exclusion Analysis (page 2)

"Executive and management functions" are defined as:

- a. participation in a significant manner in the formulation, determination, and implementation of management policy; or,
- b. effective authority to commit the employer's resources.

To participate in a significant manner in the formulation, determination, and implementation of management policy, the employee must have greater authority than merely offering advice to higher-level management which may accept or reject the recommendation, or must do more than serving on a management team/ committee which must reach consensus. Formulation, determination, and implementation of management policy must be the primary duty of the employee and must be at a level similar to that exercised by division administrators, bureau directors, and institution heads.

Case 33 did not address the resource commitment aspect of the executive and managerial functions. In municipal sector cases, the WERC has defined this aspect as the exercise of effective authority to commit the employer's resources such as through exercise of authority to establish an original budget or to allocate funds for differing program purposes from such an original budget when the purpose of such funds has not been previously specified.

9. Rationale for the above conclusion (use additional paper if necessary):

This position participates in a significant manner in the formulation, determination, and implementation of management policy specifically as it relates to management responsible for the Customer Support Center Section, which includes the Workstation Support Unit and the Service Desk Unit. The Service Desk Unit handles problem calls from internal Department of Revenue (DOR) staff. They are responsible for first level problem determination and resolution, and for escalating unresolved problems to the appropriate support areas for attention. The Workstation Support Unit is responsible for the selection, testing, implementation and support of desktop hardware, software, printers, mobile devices and voice services.

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A signature below means the position has been reviewed and you have concluded it meets the definition of management found in s. 111.81(13), Wis. Stats.

Supervisor Signature _____ Date _____
Sally Jackson

Human Resources Representative _____ Date _____
Linda Weber